

# **SATERN Phase III Project**

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## **Change Management Guide: Individual Development Planning (IDP)**

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National Aeronautics and  
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**Change Management Guide  
for  
SATERN Phase III  
Individual Development Planning (IDP)**

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# INTRODUCTION

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## PURPOSE OF THIS GUIDE

The purpose of this guide is to assist NASA Centers in preparing for the Individual Development Plan (IDP) implementation in the System for Administration, Training, and Educational Resources for NASA (SATERN). It provides information on planning for change management tasks such as: communications, marketing, training, and ongoing support. Change events and activities can facilitate the acceptance of the IDP implementation by enhancing awareness, understanding, and support for the initiative throughout NASA and among interested and affected parties.

**This guide specifically addresses Phase III implementation of the IDP and provides information that Centers can use to build and implement their IDP change management plans. Additional guides or updates will be provided to the Centers for other change management areas and for subsequent phases.**

## BACKGROUND

As outlined in the NASA Policy Directive (NPD) 3410.2E, *Employee and Organizational Development*, NASA clearly supports the enhancement of employee capabilities and competencies through formal and informal developmental experiences. NPD 3410.2E defines the responsibility of managers and supervisors in working with employees to prepare IDPs.

In October 2006, the IDP Sub-Team was chartered to develop an agency-wide standard IDP template and process that will be launched in SATERN as part of Phase III. This Sub-Team was also tasked with recommending business rules for the individual development planning process and identifying training and communications needs for the implementation. Their approach consisted of building SATERN skills, involving key stakeholders, understanding previous agency work in this area, and researching current processes. In February 2007, the IDP Sub-Team delivered a standard IDP template, process, and recommendations for implementing individual development planning in SATERN.

## IDP OVERVIEW

The IDP is an official planning and record-keeping document used to capture the training and development activities of NASA civil service employees. It is a critical element of the enhancement of employee capabilities and competencies, and offers employees a standardized method of recording formal and informal developmental experiences. Individual development planning as a process contributes to NASA's goal of ensuring a more knowledgeable and highly skilled workforce. Through the strategic partnering of employees and their supervisors, employees will formally identify their professional development goals and create a plan to achieve those goals.

In accordance with the IDP Sub-Team recommendations, the IDP will be rolled out across the agency in conjunction with the NASA 2008 Employee Performance Communication System (EPCS) appraisal period; where applicable, steps in the IDP process will be chronologically linked to the EPCS performance management process . However, the IDP will have no bearing on the performance appraisal itself.

The IDP in SATERN will allow all NASA civil service employees to document short-range, mid-range, and long-range career goals electronically, as well as the training activities required to reach each goal. Details about the SATERN IDP functionality will be fully addressed in the IDP training materials referenced in this document.

## **CHANGE MANAGEMENT**

Communication and training are critical aspects of the IDP implementation. One of the objectives of the change management activities is to ensure that communication and training for the IDP is relevant, accurate, consistent, and just-in-time. Change management for the IDP implementation will be supported at the agency level by the SATERN Change Management Team. At each NASA Center, change management is the responsibility of the assigned Phase III Change Management Representatives, as well as the Phase III Transition Representatives. In addition to this change management guide, the agency will provide various communication and training materials to the Centers to support IDP change management efforts.

A communications and training guide was distributed to the Centers for each of the previous project phases of SATERN. These guides can be found on the SATERN project website at [https://saternproject.nasa.gov/documents\\_archive.html](https://saternproject.nasa.gov/documents_archive.html). The basic and foundational information provided in these guides is supplemented here with specific information regarding the IDP implementation.

# COMMUNICATIONS AND MARKETING

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To build on the communications overview and principles provided in the [Phase II e-Training Communications Guide](#), the following Key Audiences, Core Messages and Communications Planning sections have been tailored specifically to the IDP implementation.

## UNDERSTANDING KEY AUDIENCES

Effective communication requires up-front identification and analysis of key audiences critical to the success of the IDP implementation. Within this document, Center-level audiences (versus agency-level) will be the primary focus. In identifying these audiences, it is important to group them together in manageable segments. An effort should be made to understand the perspectives and issues of each key audience group. This will help ensure properly targeted vehicles and relevant content. It should be noted that all audiences may not exist at all Centers. Although Centers may choose to do a more detailed stakeholder analysis, the following table provides a summary of the key audiences at the Center that should be the target of IDP communications:

Audience Segment	Description
<b>Executive Leadership Team</b>	The senior leadership team at the Center; usually the Center Director and his/her direct reports
<b>Senior Management</b>	Center Division chiefs and Department/Office Managers
<b>Supervisors</b>	Civil service employees with the responsibility for planning the work, monitoring and assessing performance, and developing the skills of NASA employees
<b>Center Training Office Employees</b>	Specialists and Administrators in the Center Training Office who provide support to Center employees for training-related requests
<b>Training Coordinators</b>	Points of contact for training within directorates or divisions in the Center
<b>HR Directors</b>	Principal management advisors to the Center Director and Center senior management; manage Center-based human resources programs
<b>HR Specialists (OD)</b>	Specialists located in Center human resources office who provide organizational development support to the directorates' or divisions' leadership and staff
<b>Performance Management Subject Matter Experts</b>	HR Specialists at the Centers with functional responsibility for the implementation of the Employee Performance Communication System (EPCS), NASA's performance management system (planning, monitoring, developing, rating, and rewarding performance) for all non-SES/ST/SL employees
<b>Center Union Representatives</b>	NASA civil service employees who serve as representatives of the local unions, with whom any changes to local working conditions must be negotiated
<b>Coaches/Mentors</b>	NASA employees designated by the learner to provide advice and input during the development of the IDP; do not have approval capability
<b>SATERN Administrators</b>	Points of contact for SATERN training and administration in the Center
<b>Civil Service Employees</b>	NASA civil service employees who will use SATERN to complete an IDP
<b>Contractors</b>	Contracted employees working for NASA

Audience Segment	Description
<b>Contracting Officer Technical Representatives (COTRs)</b>	NASA civil service employees who monitor contract performance and are responsible for the oversight of contractors

*Figure 1: IDP Implementation Audience Segments*

## Key Audience Requirements

In crafting a communications plan, it is important to understand the behaviors or actions that the Centers hope to elicit from each audience, and the information these stakeholders need in order to take these actions. Some information, such as the purpose and benefits of IDP, will be important for all stakeholders. The table below outlines key requirements by audience segment.

Audience Segment	Desired Behaviors / Actions	What They Need to Know
<b>Executive Leadership Team</b>	<ul style="list-style-type: none"> <li>▪ Articulate IDP implementation core messages when communicating to staff and other Center audiences</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP</li> <li>▪ Impacts to people, systems and processes; implementation phases (high level)</li> <li>▪ Rationale behind decision to implement IDP in SATERN</li> <li>▪ Agency guidance regarding the IDP</li> <li>▪ Where to go / whom to contact for information</li> </ul>
<b>Senior Management</b>	<ul style="list-style-type: none"> <li>▪ Provide general support</li> <li>▪ Take strategic interest in incorporating the IDP into the performance management cycle</li> </ul>	
<b>HR Directors</b>	<ul style="list-style-type: none"> <li>▪ Articulate IDP implementation core messages when communicating to staff and other Center audiences</li> <li>▪ Provide general support</li> <li>▪ Take strategic interest in incorporating the IDP into the performance management cycle</li> </ul>	
<b>Supervisors</b>	<ul style="list-style-type: none"> <li>▪ Take a leadership role in communicating with staff about the implementation, and in guiding employees to applicable resources</li> <li>▪ Encourage use of the IDP in SATERN by their employees</li> <li>▪ Understand their role in the IDP process, both in and out of SATERN</li> <li>▪ Actively use system and process to demonstrate their commitment and set an example for their employees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP</li> <li>▪ How and when IDP functionality will impact employees; timeline and steps in IDP process</li> <li>▪ Agency guidance regarding the IDP</li> <li>▪ Roles and responsibilities of supervisors in the IDP process</li> <li>▪ Where to go / whom to contact for information</li> </ul>
<b>Training Office Employees</b>	<ul style="list-style-type: none"> <li>▪ Take an active role to ensure a successful implementation at their Center</li> <li>▪ Participate in planning activities, be aware of developments, and raise questions and concerns to the Phase III Team</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP</li> <li>▪ Impacts to people, systems and processes; implementation phases</li> <li>▪ Agency guidance regarding the IDP</li> <li>▪ Where to go / whom to contact for information</li> <li>▪ What communications and training materials will be provided</li> </ul>
<b>Training Coordinators</b>	<ul style="list-style-type: none"> <li>▪ Take an active role to ensure a successful implementation within the directorates or divisions for which they are responsible</li> <li>▪ Be proactive in articulating IDP core messages and providing updates to staff in their organization</li> </ul>	
<b>HR Specialists (OD) &amp; Performance Management Subject Matter Experts</b>	<ul style="list-style-type: none"> <li>▪ Be proactive in articulating IDP implementation core messages and providing updates to staff in their organization</li> </ul>	

Audience Segment	Desired Behaviors / Actions	What They Need to Know
<b>Center Union Representatives</b>	<ul style="list-style-type: none"> <li>▪ Be proactive in keeping members informed and providing updates about the IDP implementation</li> <li>▪ Support the use of the IDP in SATERN as a career development tool</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP</li> <li>▪ Rationale behind the decision to implement IDP in SATERN</li> <li>▪ Impact of IDP implementation to NASA civil service employees</li> <li>▪ Where to go / whom to contact for information</li> </ul>
<b>Coaches / Mentors</b>	<ul style="list-style-type: none"> <li>▪ Use SATERN to provide guidance and advice during the IDP planning process.</li> <li>▪ Encourage the use of IDP in SATERN as a career development tool</li> </ul>	<ul style="list-style-type: none"> <li>▪ Which IDP functions are available to Coaches and Mentors in the SATERN system</li> <li>▪ The role of the Coach / Mentor in the IDP process</li> </ul>
<b>SATERN Administrators</b>	<ul style="list-style-type: none"> <li>▪ Be proactive in articulating IDP implementation core messages</li> <li>▪ Take an active role in the implementation of IDP as required</li> <li>▪ Encourage the use of IDP in SATERN</li> <li>▪ Participate in planning activities, be aware of developments, and raise questions and concerns to the Phase III Team</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP implementation</li> <li>▪ How and when IDP will impact SATERN Administrators <ul style="list-style-type: none"> <li>- What will change; what they will be doing differently</li> <li>- New processes</li> </ul> </li> <li>▪ Agency guidance regarding the IDP</li> <li>▪ Where to go / whom to contact for information</li> </ul>
<b>Civil Service Employees</b>	<ul style="list-style-type: none"> <li>▪ Use the IDP in SATERN to document their career development goals and activities</li> <li>▪ Exhibit awareness that IDP will be implemented in SATERN</li> <li>▪ Articulate how IDP benefits NASA and its people</li> </ul>	<ul style="list-style-type: none"> <li>▪ Purpose and benefits of IDP</li> <li>▪ IDP process; timeline</li> <li>▪ Their responsibilities in the IDP process, and those of their supervisors – both in and out of SATERN</li> <li>▪ The relationship of the IDP to the performance management process</li> </ul>
<b>Contractors</b>	<ul style="list-style-type: none"> <li>▪ Exhibit awareness that IDP will be implemented in SATERN, but that it is <i>not</i> intended for contractor use</li> </ul>	<ul style="list-style-type: none"> <li>▪ Agency guidance regarding IDP as it pertains to contractors</li> </ul>
<b>COTRS</b>	<ul style="list-style-type: none"> <li>▪ Exhibit awareness that IDP will be implemented in SATERN, but that it is <i>not</i> intended for contractor use</li> <li>▪ Respond appropriately if a contractor attempts to use the IDP in SATERN</li> </ul>	<ul style="list-style-type: none"> <li>▪ When IDP functionality will be available in SATERN</li> <li>▪ Agency guidance regarding IDP as it pertains to contractors</li> <li>▪ Where to go / whom to contact for information</li> </ul>

Figure 2: IDP Implementation Audience Requirements

## CORE MESSAGES

Center communications should incorporate and build upon these critical concepts. Messages will need to be customized to each Center's specific culture and adjusted by project status.

### Strategic Core Messages

Strategic communication is the means of aligning the performance of individuals and the organization with NASA's mission and strategy. Words and ideas can enable employees to understand and commit to the goals and objectives associated with the IDP implementation. Strategic core messages answer the question: What are we doing and why?

- ***The IDP is an official planning and record-keeping document used to capture the training and development activities of NASA civil service employees.*** The IDP is critical to the enhancement of employee competencies, and offers employees a standardized method of recording formal and informal developmental experiences.
- ***Individual development planning contributes to NASA's goal of ensuring a more knowledgeable and highly skilled workforce.*** Through the strategic partnering of employees and their supervisors, employees will formally identify their professional development goals and create a plan to achieve those goals.
- ***NASA policy supports the enhancement of employee skills and the importance of employee development.*** NASA Policy Directive (NPD) 3410.2E states that NASA supervisors and their direct reports are responsible for "assessing current capabilities, determining near- and long-term development and training to enhance employee performance, and preparing Individual Development Plans (IDP) that support job requirements to include timely completion of supervisory and management training, career goals, and agency needs."

### Tactical Core Messages

Tactical communications carry the specific messages of what changes will happen, who is affected, when, why and how. Tactical core messages answer the questions: How will we accomplish our goal? What actions are desired?

- ***The IDP is intended for use by NASA civil service employees.*** While NASA contractors will have access to the IDP in SATERN, use of the IDP by contractor employees is not encouraged or supported.
- ***The IDP process will coincide with the performance management appraisal period, but it will not be a factor in the performance review.*** The completion of training and other activities in support of the IDP will not impact performance ratings. Although the IDP is a component of the EPCS, and meetings with employees and supervisors will take place in the same timeframe as performance

discussions, the focus of the IDP is on developing manageable and measurable goals to build employee skills.

- ***Developing an IDP is a collaborative process between employees and their supervisors.*** Planning for employee development is a joint process which gives the employee and supervisor an opportunity to set career goals and identify activities to support those goals.
- ***SATERN is a tool which assists employees and supervisors in developing an IDP.*** The IDP functionality in SATERN is used for recording and documenting training and development activities, and its use should be preceded by face-to-face career development conversations between employees and their supervisors. Both employees and supervisors should agree on career goals and objectives before the supervisor approves and activates the IDP in SATERN.
- ***The IDP does not guarantee training and development opportunities.*** Adding a learning event to an IDP, and having that IDP approved, does not guarantee registration/participation in the event(s).

### Personal Core Messages

Effective and meaningful messages are those which clearly communicate to employees the answer to the question, "What's in it for me?" For communications to be successful, Centers will need to communicate the benefits of individual development planning as well as how the new IDP process and template will affect the daily activities of each audience. Personal core messages address how activities will be impacted on a day-to-day level and answer the question, "Who will be impacted and how?"

- ***Employees will have access to information and training materials regarding the IDP in SATERN.*** NASA civil service employees will have the opportunity to participate in training and informational sessions regarding individual development planning. Job aids and FAQs on the IDP will also be available on the SATERN Informational website.
- ***The IDP will support the development of NASA employees.*** The IDP process and tool will facilitate the career development of employees by fostering conversations between employees and supervisors, and will offer employees a tangible, standardized means of documenting career goals.
- ***The IDP's integration with SATERN benefits NASA employees.*** Since the IDP is integrated with the SATERN learning management system, completed learning events will be automatically recorded in both the Learning History and the IDP. The SATERN IDP is also available around the clock, and is accessible from work or home for the users' convenience.
- ***The SATERN Help Desk will be available to provide technical assistance to employees who are creating IDPs.*** Employees can contact the SATERN Help Desk for technical support at 1-877-NSSC-123 (1-877-677-3123) or [nasa-satern.support@nasa.gov](mailto:nasa-satern.support@nasa.gov). SATERN Help Desk support hours are Monday through Friday, 8:00 am – 8:00 pm ET.

## **Tailoring Tactical and Personal Messages to Specific Audiences**

Additional messages will vary by audience in terms of content and level of detail. For example, since the Centers currently have different methods of individual development planning, the new IDP process and standard template will affect each Center's processes in varying ways. Communications must address the concerns and "need to know" for each of the audiences, and the senior leaders and supervisors must have a clear understanding of the changes that will take place at their Center.

## **DELIVERING CORE MESSAGES**

The SATERN Change Management Team will provide a number of communication materials for the Centers to use in their efforts to create awareness of the IDP. A list of these materials can be found in Appendix A of this document. Centers will need to select and prioritize the number and types of communications vehicles based upon anticipated effectiveness for reaching targeted audience in a timely manner. The following is a list of vehicles for possible use for communications.

### ***Print and Technology / e-Enabled Vehicles***

- Center websites
- Center newsletters
- Center-wide e-mails
- Posters and fliers

### ***Face-to-Face Vehicles***

- Town hall meetings
- Staff meetings
- One-on-one briefings
- Open house / marketing booths

A simple way to deliver these materials and core messages is to "piggyback" on existing vehicles (e.g., give a presentation in recurring meetings, write articles for newsletters, send notices in routine e-mails, distribute fliers at other training events, etc.).

## **MARKETING**

Before and after implementation, Centers will want to promote and market the IDP in SATERN on an ongoing basis. The SATERN Program Office will provide a number of communication and training materials for use by the Centers.

Development of a Center communications and marketing strategy and plan is an important component of the successful implementation of IDP functionality, and just as critical is a periodic review of the marketing strategy and efforts. A review is an ideal opportunity to revisit Center goals to determine whether or not the current plan is effective in accomplishing objectives. Ask the following questions: Did the marketing work? Did the techniques work? Was it worth the effort? What was gained from this communication or marketing effort?

It is advisable to track the success of the various marketing techniques. If there was a spike in usage following a particular marketing effort this could indicate success. If the result is less than desired, consider why this particular effort was not effective. Reasons could include changes in the work environment that could have hindered marketing efforts. Where applicable, new agency initiatives provide an excellent opportunity to refresh marketing efforts and promote the IDP in conjunction with the initiative.

## PLANNING FOR COMMUNICATIONS AND MARKETING

Consistent, core messages are essential to the effectiveness of the Center communications plans. Centers will need to tailor messages with the audiences in mind. This is no easy task given the variety and diversity of stakeholder groups with different levels of knowledge, awareness, experience, and viewpoints of the IDP implementation and its objectives. Accordingly, the initial focus of Centers should be on increasing awareness of the initiative among stakeholders. However, as the project progresses, more tailored and frequent communications to audience segment groups will be required, as well as a shift in messages. The table below outlines a suggested schedule for planning communications.

	Timeframe <sup>1</sup>	Audience Segment	Content	Potential Vehicle(s)
Awareness	11 – 12 weeks	<ul style="list-style-type: none"> <li>Executive leadership team</li> <li>Senior management</li> </ul>	<ul style="list-style-type: none"> <li>High-level overview</li> <li>Purpose and benefits</li> </ul>	<ul style="list-style-type: none"> <li>One-on-one briefings</li> <li>Staff meeting presentations</li> <li>Talking points</li> </ul>
	9 – 10 weeks	<ul style="list-style-type: none"> <li>All audiences</li> </ul>	<ul style="list-style-type: none"> <li>High-level overview</li> <li>Purpose and benefits</li> </ul>	<ul style="list-style-type: none"> <li>Town hall meetings</li> <li>Center-wide e-mails</li> <li>Posters</li> </ul>
Understanding	6 – 8 weeks	<ul style="list-style-type: none"> <li>HRD Specialists &amp; Training Office employees</li> <li>Training Coordinators</li> <li>HR Directors</li> <li>SATERN Administrators</li> </ul>	<ul style="list-style-type: none"> <li>Major milestones and schedule</li> <li>Detail on implementation plans and progress</li> </ul>	<ul style="list-style-type: none"> <li>One-on-one briefings</li> <li>Directed e-mails / talking points</li> </ul>
		<ul style="list-style-type: none"> <li>All audiences</li> </ul>	<ul style="list-style-type: none"> <li>Project status and schedule</li> <li>High-level process impacts</li> <li>Impacts of IDP implementation on each audience</li> <li>Information regarding training</li> </ul>	<ul style="list-style-type: none"> <li>Town hall meetings</li> <li>Staff meetings</li> <li>Center website / newsletter</li> </ul>
Implementation	5 – 6 weeks	<ul style="list-style-type: none"> <li>All audiences</li> </ul>	<ul style="list-style-type: none"> <li>Information on support plans</li> <li>Details on training</li> <li>Update on implementation</li> <li>Pre- go-live announcements</li> </ul>	<ul style="list-style-type: none"> <li>Center website / newsletter</li> <li>Town hall / staff meetings</li> <li>Center-wide e-mails</li> </ul>
	2 – 4 weeks	<ul style="list-style-type: none"> <li>SATERN Administrators</li> <li>HR Specialists &amp; Training Office employees</li> <li>Training Coordinators</li> <li>NASA civil service employees and supervisors</li> </ul>	<ul style="list-style-type: none"> <li>IDP process and functionality</li> <li>Schedule for training and live lab sessions</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrations / Live Labs</li> <li>Training sessions</li> <li>Fliers</li> <li>Job aids</li> </ul>
Feedback	Launch and post-implementation (ongoing)	<ul style="list-style-type: none"> <li>All audiences</li> </ul>	<ul style="list-style-type: none"> <li>Go-live announcements</li> <li>Update on IDP implementation</li> <li>Feedback and lessons learned</li> <li>Ongoing marketing</li> </ul>	<ul style="list-style-type: none"> <li>Self-paced training</li> <li>Feedback sessions / focus groups</li> <li>Surveys</li> <li>Help Desk</li> <li>Center-wide e-mails</li> </ul>

Figure 3: Suggested Schedule for IDP Implementation Communication

<sup>1</sup> Number of weeks before the beginning of the performance management cycle

## NEXT STEPS

Using the information contained in this guide and the [Phase II e-Training Communications Guide](#), Centers can build a communications plan that outlines the audience segments, vehicles, and messages that will be implemented at the Center level. In summary, there are seven key steps to implementing Center communications plan for the IDP implementation:

- Establish Center communications goals
- Define any additional audience segments
- Create / modify core messages for each audience
- Select vehicles for each message and audience
- Identify timing for each message
- Implement plan
- Gather feedback and evaluate communications/marketing

The matrix below is a sample template that can be used for Center planning.

<b>Audience</b>	<b>Message (Content)</b>	<b>Vehicle</b>	<b>Delivery Timeframe</b>	<b>Delivery Owner</b>

*Figure 4: Sample Template for Center Communications Planning*

# TRAINING

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The implementation of IDP in SATERN will change existing development planning processes. The purpose of this section is to help Centers address the training challenges they will face when implementing IDP. This guide builds upon the information outlined in the [Phase II SATERN Training Guide](#), which can be found at [https://saternproject.nasa.gov/documents\\_archive.html](https://saternproject.nasa.gov/documents_archive.html).

One of the biggest training challenges that Centers should expect to encounter is providing each affected employee with the appropriate opportunities to receive training on IDP, and giving them the confidence to be self-sufficient with the new process and system.

**This guide specifically addresses IDP implementation and provides information that Centers can use in planning for IDP training. Additional guides or updates will be provided for other change management areas and for subsequent phases.**

## OVERALL TRAINING APPROACH

The training approach for the IDP implementation is role based, and combines the use of web-based training (WBT), instructor-led training (ILT), and job aids. The delivery method varies by audience and phase in the implementation process.

ROLE	PHASE	PREFERRED DELIVERY METHOD	RESPONSIBLE PARTY	
			Development	Delivery
Learner, Supervisor, Coach/Mentor	Launch	Instructor-led / classroom-based; job aids	Agency	Center
	Ongoing	Web-based / self-paced; job aids	Agency	Center
Administrator	Launch	Instructor-led web meeting; job aids	Agency	Agency
	Ongoing	Recorded web meeting; job aids	Agency	Center

Figure 5: SATERN IDP Training Overview

## IDP TRAINING FOR LEARNERS, SUPERVISORS, COACHES AND MENTORS

Critical to the success of the IDP implementation is effective end-user training. While many users are already familiar with SATERN, individual development planning in SATERN presents new functionality. In addition, some users may be accessing SATERN for the first time in order to complete their IDPs. For SATERN training resources for new users, refer to the *Phase II SATERN Training Guide*.

Training on IDP for learners, supervisors, and coaches/mentors is designed to allow for flexibility in delivery. The preferred method of delivery for the IDP implementation is instructor-led training in a computer lab or classroom environment, which gives instructors at the Centers the ability to walk through IDP functionality in a hands-on manner and provides the opportunity for NASA employees to ask questions. However, the actual delivery method employed will depend on the needs of the audience and on

Center resources. Following the full launch of IDP, web-based training will offer the advantage of “anytime, anywhere” convenience in combination with the ability to progress at one’s own pace.

For all end users, training will be centered around a single core course focused on how to prepare for, create, and maintain IDPs in SATERN. This core course will cover how to perform standard IDP tasks through lecture, illustration, interaction, and job aids. This approach assumes NASA employees and supervisors are not new users of SATERN and are familiar with basic SATERN functions. The class hours indicated are estimates and will vary based upon the chosen delivery method. For example, these materials can be used for presentations and demonstrations in auditorium / open house venues, or in smaller sessions which allow for discussion. Figure 6, below, summarizes the training options available to employees in each role.

ROLE	TRAINING OPTIONS AVAILABLE	CLASS HOURS
Learner	IDP Overview	1
	<b>TOTAL</b>	<b>1</b>
Supervisor	IDP Overview	1
	IDP for Supervisors	1
	<b>TOTAL</b>	<b>2</b>
Coach / Mentor	IDP Overview	1
	IDP for Coaches and Mentors	.25
	<b>TOTAL</b>	<b>1.25</b>

Figure 6: IDP Training Options for Learners, Supervisors, & Coaches / Mentors

### **Training Descriptions**

Following is a brief description of each IDP training option. IDP training materials and job aids will be available online prior to launch at <https://saterninfo.nasa.gov>.

#### **IDP Overview (Core Course)**

The *IDP Overview* training course provides learners with the knowledge of how to prepare for, create, and maintain IDPs in SATERN. Topics will include preparing for the IDP process, creating an IDP, getting feedback on the IDP, submitting the IDP for approval, modifying the IDP, and managing multiple IDPs. The same topics will be covered in both the ILT and self-paced training versions.

The instructor-led version is intended to provide hands-on experience to learners in the launch phase of the implementation. The agency will provide a slide presentation designed to be used in a classroom or meeting setting that allows for demonstration and discussion. The web-based training will be available online and can be used as refresher training or as an ongoing training solution for new employees.

## **IDP for Supervisors**

Supervisors play a critical role in the implementation of IDP. They support the development of their direct reports by reviewing, discussing and approving development plans. In addition supervisors model behaviors and communicate messages that affect how NASA employees will respond to the IDP implementation. The ***IDP for Supervisors*** course will cover the role of the supervisor in the IDP process: reviewing and approving IDPs, notifications, and generating reports. The same topics will be covered in both the instructor-led and web-based versions of this course.

## **IDP for Coaches and Mentors**

Coaching and mentoring programs at NASA help to improve the capabilities of employees. Though they are not involved in the IDP approval process, coaches and mentors may provide input and feedback on an employee's IDP as requested during the planning phase. The selection of a coach or mentor to review the IDP is optional and may not be applicable to all employees.

The agency will provide a slide presentation on ***IDP for Coaches and Mentors*** that is designed to be used in a classroom or meeting setting. This module will show interested NASA employees what to expect if they have been selected as a coach in the IDP, and how to provide feedback to the learner. This module can be integrated with the ***IDP Overview*** course or with the ***IDP for Supervisors*** course, depending upon how coaching and mentoring has been implemented at the Center. The same topics will be covered in both the instructor-led and web-based versions of this module.

## **IDP TRAINING FOR SATERN ADMINISTRATORS**

IDP training for SATERN Administrators consists of the ***IDP Overview*** core course, plus an additional course for SATERN Administrators. ***IDP for SATERN Administrators*** has been designed to be delivered initially by the agency via the web, specifically in an instructor-led web meeting. Ongoing training after launch is designed to be delivered in the form of a recorded instructor-led web meeting, job aids, and support from the Center. It is assumed that this audience consists of experienced SATERN Administrators who have received appropriate SATERN Administrator training. Guidance on general training for SATERN Administrators can be found in the *Phase II SATERN Training Guide*.

<b>ROLE</b>	<b>TRAINING OPTIONS AVAILABLE</b>	<b>HOURS</b>
SATERN Administrator	IDP Overview	1
	IDP for SATERN Administrators	1
	<b>TOTAL</b>	<b>2</b>

*Figure 7: IDP Training Options for SATERN Administrators*

## **IDP for SATERN Administrators**

This course will guide SATERN Administrators through the new functionality that will be available to Administrators. Topics include assigning competencies to items and external events, and generating reports. The recorded web meeting can be used as refresher training or as an ongoing training solution for new Administrators. Job aids will be available online.

## **RESOURCES TO SUPPORT TRAINING DELIVERY**

The SATERN Training Environment and the SATERN Help Desk are additional resources to assist Centers with delivering SATERN training and helping employees understand and use the new IDP process and template. Prior to launch, the SATERN training environment will be updated with the IDP functionality and will be available for demonstrations and training.

## **SATERN IDP Training Checklist**

This checklist is intended to serve as a guide for Centers of some of the key questions that need to be addressed when creating a training plan for the IDP implementation.

- Are the learners at your Center currently familiar with SATERN?
- Are the learners at your Center currently using IDPs?
- Are there any employees who will be completing IDPs who are unfamiliar with SATERN?
- What is your Center's timeline for the marketing and roll-out of IDP in SATERN?
- When will agency-level IDP training occur?
- Based on your Center's roll-out approach, when will training need to occur?
- What training materials will be provided to the Center? When will the materials be available?
- Does your Center have a Help Desk? Has information on IDP been provided to Center Help Desk personnel?
- What end-user support is required during and after the IDP implementation (e.g., Help Desk, job aids, FAQs)? If not provided by the agency, what is the Center's plan to address this support need?

## ONGOING SUPPORT FOR CHANGE MANAGEMENT

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The SATERN Change Management Team at Headquarters is available to address questions on change management planning and to provide support and assistance to Center Change Management Representatives in the creation of Center-level plans.

Questions on this guide or requests for support should be directed to Yvette Robinson at [yvette.robinson-1@nasa.gov](mailto:yvette.robinson-1@nasa.gov) or 202-358-0327, or Kate Heath at [kate.g.heath@nasa.gov](mailto:kate.g.heath@nasa.gov) or 202-358-1364.

## APPENDIX I - IDP COMMUNICATIONS MATERIALS

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The following communication materials will be provided by the SATERN Program Office to assist Centers in planning for and delivering IDP communications.

Materials	Description	Suggested Delivery
IDP Brochure	The IDP brochure provides a high-level summary of the IDP in SATERN, including its benefits, when it will be available, and how to access it.	It is intended to be distributed to all NASA civil service employees via department/organization leadership; it will also be available online.
IDP Fact Sheet / Frequently Asked Questions (FAQ)	The IDP FAQ answers the questions typically asked about the IDP by both learners and supervisors.	It is intended to be used as a handout at department meetings and/or passed out at marketing and informational events; it will also be available online.
IDP Sample Articles	IDP sample articles build upon the core messages outlined in the communications plan. The objective of the articles is to raise awareness among key audiences about the IDP implementation so that audiences know what IDP is, why NASA is offering it in SATERN, and how NASA employees will be impacted.	The articles are intended for use in existing Center newsletters or on Center websites.
IDP Overview Presentation	This brief set of slides provides a general overview of the IDP and important dates in the IDP process.	This presentation is intended for use in department or organization-level meetings.
Posters	The poster is designed to capitalize on the existing SATERN branding, capture the attention of the audience, and provide a simple and direct message that supports IDP awareness efforts.	IDP posters are intended to be displayed in high traffic areas at the Centers to promote awareness of IDP.